TELL THE STORY
CAAL Narrations

- Organize your thoughts before you begin your narrative.

- Always use appropriate headlines. **Mandatory**

    - This will enable anyone to see at a glance the subject of the narration
    - Select a headline from the list of CAAL headlines.
    - Use *** before and after the headline.
    - Do NOT got to the next line to begin the narration. If you have multiple actions, use a headline for each topic divided by a /.
    - The headline cannot be the entire narration.
    - Headline CAAL dates with the screen name.   Example: **OTAS-OCAL**
    - Headline the strange and unusual or special events.

- Start with what prompted action on this case

For example: Call from customer...
                      Received review forms...
                      Alert.....

- Be brief but concise.

    - Consider a sequential narrative as you name the steps and actions taken on the case.
    - Consider information that is pertinent to the case and the transaction.
    - Always narrate *why* you made the decision you made. Tell the story!
    - Document names, numbers, specifics that are not on PACMIS screens.
    - Take the time to re-read your narratives. Too much may be better than too little.
    - Use appropriate abbreviations. Ask, "Does it make sense to me?" and "Will someone else be able to understand this narrative?" or "Will someone else be able to pick up where I've left off on this case?

For example: REV IN. UPDATED. This is too brief. Consider this alternative:
*REVIEW-COMPLETE*** REC'D REV STAMPED 12DEC04. E-FIND DONE. NO APPARENT CHANGES. NO QUARTERLY EARNINGS. REGISTERED REV. COPIED DETAILS INTO JANUARY. PROCESSED AND AUTHORIZED. NO CHANGES TO BENEFITS. SENT GERE. NEXT REV APR05.*

- Remember, others can and DO read your CAAL narratives.

  - Don't assume too much in terms of what you think a reader knows.
  - Be non-judgmental: don't allow personal feelings, biases, values, etc., to enter into your narrative.
  - Observations may be necessary and appropriate, but they will require careful language.

- Be professional: consider correct spelling, grammar, and avoid incomplete or unfinished sentences and/or thoughts, etc.

- PACMIS does not have word wrap. Begin and end each line on CAAL with either a completed word and/or an appropriately hyphenated or abbreviated word.

- Be sure that your narrative includes the basics such as who**,** what**,** where**,** when, why, and how. **Tell the Story!**

Narrating Reviews and Applications

- Use the appropriate headline. Document how the interview took place (in person, by phone, etc). Document any pertinent information that needs an explanation. It is not necessary to document screen by screen. The edit information at the end of the application may be good to address in your narration if there are unusual circumstances.

- Income - Document place of employment and explain best estimate. Identify PMV or unusual income.

- Document deductions. Identify spenddown with headline. *Spenddown-MO/YR*.

- Health Plans - Include how the client was educated, the selection and reason for selection.

- Tobacco survey - create a new narration for the Tobacco Survey narration.

A good CAAL narrative saves a lot of time and energy for everyone.

HEADLINES

Applications

(Program type)-App received

(Program type)-App approved/denied

(Program type)-Adding to open case

Assets

(Type of asset)-Reported

(Type of asset)-Verified

FM-TR

FMTR Qtrly report-complete

FMTR Qtrly report-incomplete

FMTR Qtrly report-info

Household Composition

HH Comp-add'l person (added/reported)

HH Comp-baby (added, reported, removed)

HH Comp - person removed

Income

Income-New job

Income-Change in BE

Income-Termination

Income-SSA/SSI

Income-Child support

Income-Alimony

Income-Unemployment

Income-Worker's Comp

Income-Verified

Investigations

Investigation requested

Investigation to ORS

Medical

MRB - Action Described

Health Plan Selection

Spenddown MO/YR

SSI Protected Group

Tobacco Survey

Miscellaneous

Case transfer info

(Program type) Closure (Specify closure code)

Response to _____

Question about _____

ORS

ORS-Marital status

ORS-Non-cooperation

ORS-Disqualification

ORS-Duty of support requested

ORS-Duty of support received

ORS-Child-in-common

ORS-Paternity established

ORS-overpayment referred

Reviews

Review-Complete

Review-Incomplete

Review–Information

Screen Headlines

Screen name

Verification

Perm verif-(type) received

Perm verif (type) requested

Perm verif-SAVE completed

ACCEPTABLE CAAL ABBREVIATIONS

AP	=	absent parent
APP	=	application
APPT	=	appointment
AUTH	=	authorize
BE	=	best estimate
CC	=	child care
C Con	=	collateral contact
CS	=	child support
CUST	=	customer/client
DISQ	=	disqualified/disqualification
DOS	=	duty of support
EDD	=	estimated date of delivery
EXP FS	=	expedited food stamps
FS	=	food stamps
FT	=	full time
FTF	=	face to face
HC	=	hard copy
HH	=	household
ICR	=	in case record
IM	=	imaged
LL	=	landlord
NON-COOP	=	non-cooperation
PC	=	phone call
PG	=	pregnant
PP	=	prudent person
PT	=	part time
REC'D/RECD	=	received
REQ	=	requested
REV	=	review
SSN/SS#	=	social security number
STMT	=	statement
SUA	=	standard utility allowance
TERM	=	termination/terminated
TQMR	=	transitional quarterly medical report
UC OR UI	=	unemployment income
VERIF	=	verification
W/	=	with
W/OU	=	without
Z/ZZ	=	close

- Please note that this is a brief list and is subject to change.